

# ANNUAL PLANNING GUIDE FOR ADULT EDUCATION PROGRAM DIRECTORS

The RIDE Adult Education office has developed this annual planning guide to assist you in your program implementation, professional development planning, data collection, fiscal management and reporting requirements.

This user-friendly guide was designed as a helpful organizational tool and may not necessarily include **all** RIDE requirements for Adult Education programs. Additional information may be requested from the RIDE and, as such, this planning guide may be subject to change.

## KEY- Elements of the Program Planning Guide

- **Program Implementation**
- ❖ **Professional Development**
- ✓ **Fiscal**
- **Reports**
- **Data/CALIS**

## **SEPTEMBER**

- Review your RIDE Adult Education program application, including program design, proposed targets and program outcomes.
- Confirm human and fiscal resources available (funding, staffing, etc.).
- Develop or, if already in place, review monitoring system for program implementation and student progress.
  
- ❖ Review program goal setting and professional development plan.
- ❖ Develop and review schedule of PD opportunities.
- ❖ Review need for any required communication related to professional development.
- ❖ Submit Professional Development Plan.
- ❖ Schedule new staff to attend the New Practitioner Orientation (NPO).
- ❖ Ensure that new staff complete the NRS online course (refer to RIDE AE assessment policy, sec. 2.3).
  
- ✓ Confirm proposed program budget and expenditures and review plan for documentation of supplies, materials, equipment and staffing.
- ✓ Confirm compliance with time and effort procedures. (timesheets)
  
- ❑ Review Quarter 1 Program Report requirements.
  
- Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.
- Ensure that new staff are entered into CALIS.
- (end of September) Separate students not in attendance for 90 days since June and back-date to last date of attendance in the previous fiscal year.

## **OCTOBER**

- Proceed with program implementation.
- Review program targets and proposed outcomes.
  
- ❖ Continue to develop and implement your professional development plans.
- ❖ Review need for any required communication related to professional development.
  
- ✓ Proceed with program implementation.
- ✓ Conduct inventory of materials, supplies and equipments purchased with program funds.
- ✓ Confirm compliance with time and effort procedures. (timesheets)
  
- ❑ Submit Quarter 1 Program Report to RIDE.
- ❑ Maintain quarterly report documentation.

- **Review requirements and data elements for Quarter 2 Program Report.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**

## **NOVEMBER**

- **Continue to lead and support the Adult Education programs (PD, coordination with other programs, coordinate purchases and receipt of resources, planning).**
- **Monitor student progress for first quarter, and adjust program services, if necessary, to improve student outcomes.**
- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
- ✓ **Continue to confirm compliance with time and effort procedures. (timesheets)**
- ✓ **Consult with RIDE program liaison with expenditure questions.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- **Submit to RIDE, and maintain documentation for your records.**
- **Review requirements and data elements for Quarter 2 Program Report.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**

## **DECEMBER**

- **Continue to lead and support the AE programs (PD, coordination with other programs, coordinate purchases and receipt of resources,).**
- **Review program services and spending for any needed changes through a budget amendment.**
- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
- ✓ **December –Review program fiscal documentation and prepare for budget amendment, if applicable.**
- ✓ **Consult with your RIDE program liaison regarding expenditures and need to file a budget amendment.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- ✓ **Continue to confirm compliance with time and effort procedures. (timesheets)**

- ❑ Review requirements and data elements for Quarter 2 Program Report.
- ❑ Maintain Quarter 2 Program Report documentation.
- Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.
- Complete all post-tests for eligible students by December 31st.

## **JANUARY**

- Continue to lead and support the AE programs (PD, coordination with other programs, coordinate purchases and receipt of resources, program improvement planning).
- ❖ Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.
- ❖ Review need for any required communication related to professional development.
- ✓ December – January--Review program fiscal documentation and prepare budget amendment, if applicable.
- ✓ Consult with your RIDE program liaison regarding expenditures and need to file a budget amendment.
- ✓ Submit budget amendment.
- ✓ Continue to confirm compliance with time and effort procedures. (timesheets)
- ❑ Submit program budget amendment, if necessary, and maintain documentation for your records.
- ❑ Submit Quarter 2 Program Report to RIDE.
- ❑ Maintain Quarter 2 Program Report documentation for your records.
- Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.
- Run half year report on performance for July1-December 31<sup>st</sup>.

## **FEBRUARY**

- Continue to lead and support the AE programs (PD, coordination with other programs, coordinate purchases and receipt of resources, program evaluation).
- Monitor student progress for second quarter, and adjust program services, if necessary, to improve student outcomes.

- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- ✓ **Consult with your RIDE program liaison regarding expenditures and amended budget.**
- ✓ **Continue to confirm compliance with time and effort procedures. (timesheets)**
- **Review requirements and data elements for Quarter 3 Program Report.**
- **Maintain Quarter 3 Program Report documentation.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**

## **MARCH**

- **Continue to lead and support the AE programs (PD, coordination with other programs, coordinate purchases and receipt of resources, program improvement planning).**
- **Confirm receipt of all requested purchases.**
- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
- ❖ **Review need for any required communication related to professional development.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- ✓ **Review amended budget, if applicable.**
- ✓ **Continue to confirm compliance with time and effort procedures. (timesheets)**
- **Review requirements and data elements for Quarter 3 Program Report.**
- **Maintain Quarter 3 Program Report documentation.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**

## **APRIL**

- **Continue to lead and support the AE programs (PD, coordination with other programs, coordinate purchases and receipt of resources, program improvement planning).**

- Monitor student progress for third quarter, and review program services, if necessary, to improve student outcomes.
- Review summative data for program effectiveness in preparation for application for FY12 refunding.
- Consult with program design for the upcoming year.
- ❖ Review summative professional development information for evaluating the effectiveness of your activities.
- ❖ Review need for any required communication related to professional development.
- ✓ Consult with on program implementation.
- ✓ Attend RIDE Adult Education refunding roll-out (date to be announced).
- ✓ Consult with your RIDE program liaison regarding expenditures.
- ✓ Submit reimbursement documentation to RIDE Office of Finance on a timely basis.
- ✓ Continue to confirm compliance with time and effort procedures. (timesheets)
- Submit Quarter 2 Program Report to RIDE.
- Maintain Quarter 2 Program Report documentation for your records.
- Prepare FY12 refunding application.
- Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.

## **MAY**

- Finalize and submit FY12 refunding application.
- ❖ Develop professional development evaluation report.
- ❖ Develop proposed professional development activities for upcoming year based on evaluation results.
- ✓ Submit reimbursement documentation to RIDE Office of Finance a timely basis.
- ✓ Continue to confirm compliance with time and effort procedures. (timesheets)
- ✓ Consult with RIDE program liaison with expenditure questions.
- Finalize and submit FY12 refunding application.
- Review requirements and data elements for Quarter 4 Program Report.
- Maintain Quarter 4 Program Report documentation.
- Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.

## **JUNE**

- **Collect and summarize annual student and program progress information.**
- **Submit Refunding Application.**
- **Consult with RIDE Adult Education program representative on any required refunding application clarifications and revisions.**
- **Proceed with program implementation.**
- **Confirm implementation of funded summer programming.**
  
- ❖ **Develop proposed professional development activities for upcoming year based on evaluation results.**
- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
- ❖ **Review need for any required communication related to professional development.**
- ❖ **Submit professional development plan.**
  
- ✓ **Continue to confirm compliance with time and effort procedures.(timesheets)**
- ✓ **Consult with RIDE program liaison with expenditure questions.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
  
- **Respond to clarification questions or requests for revisions of FY12 refunding application.**
- **Review requirements and data elements for Quarter 4 Program Report.**
- **Maintain Quarter 4 Program Report documentation.**
  
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**
- **Complete all post-tests for eligible students by June 30<sup>th</sup>.**

## **JULY**

- **Proceed with summer program implementation (if applicable).**
  
- ❖ **Continue to develop and implement professional development activities, and collect data and feedback on their effectiveness.**
  
- ✓ **Consult with RIDE program liaison with expenditure questions.**
- ✓ **Submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- ✓ **Continue to confirm compliance with time and effort procedures.(timesheets)**

- ❑ **Respond to clarification questions or requests for revisions of FY12 refunding application.**
- ❑ **Submit Quarter 4 Program Report to RIDE.**
- ❑ **Maintain Quarter 4 Program Report documentation for your records.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff**

## **AUGUST**

- **Proceed with summer AE program implementation (if applicable).**
- **Review your Adult Education program application, including program design, proposed targets and program outcomes.**
- **Confirm human and fiscal resources available (funding, contracts, staffing, etc.).**
- **Develop or, if already in place, review monitoring system for program implementation and student progress.**
- ❖ **Develop proposed professional development activities for upcoming year based on proposed program goals and previous year's evaluation results.**
- ❖ **Schedule new staff to attend the New Practitioner Orientation (NPO).**
- ❖ **Ensure that new staff complete the NRS online course(refer to RIDE AE assessment policy, sec. 2.3)**
- ✓ **Review process to submit reimbursement documentation to RIDE Office of Finance on a timely basis.**
- ✓ **Continue to confirm compliance with time and effort procedures.(timesheets)**
- ❑ **Review Quarter 1 report requirements.**
- **Review CALIS system for your program and verify data (15<sup>th</sup> of each month). Note any questions you may have for the system developers or RIDE Adult Education program staff.**
- **Ensure that new staff are entered into CALIS.**

(March 2011)